

# **SiteManager** **Training Manual**



Module A  
Chapter 2

**Contract Administration (+)**  
**Contract Records**  
**Items**

## **Section A-2-2-4** **Viewing a Contract Item**

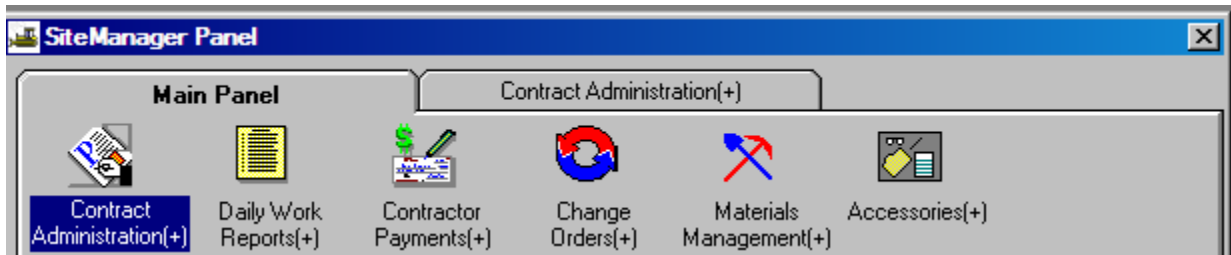
<b>Student's Version</b>
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Indiana Department of Transportation  
August, 2007 Version 3.7b

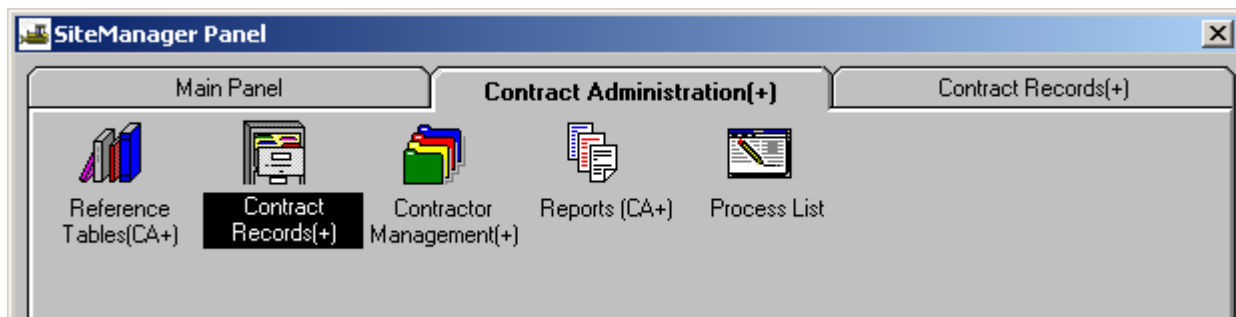
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## Viewing Items

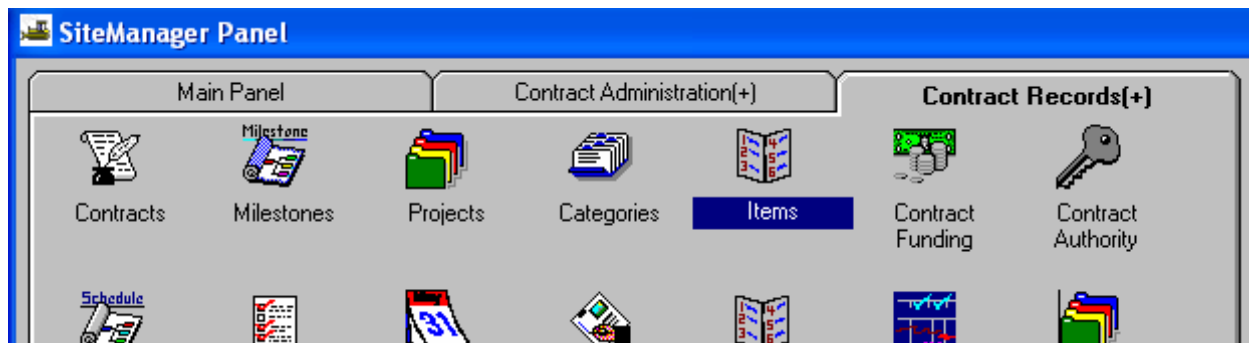
The Items window contains specific information about a specific contract's project's Contract Item as they were bid and awarded, or as modified or added by Change Orders.



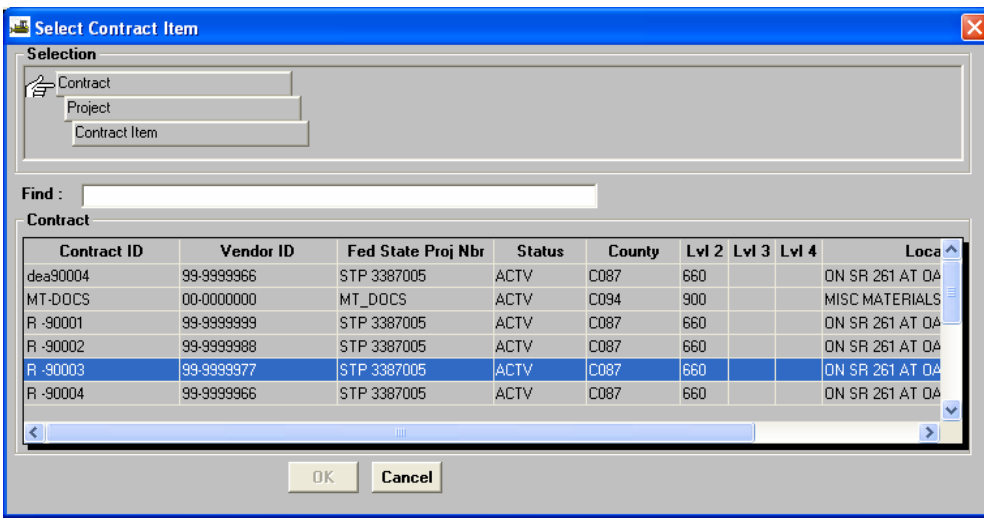
“Double-click” on **Contract Administration (+)** located on the Main Panel.




“Double-click” on **Contract Records (+)**.



“Double-click” on **Items**.



The **Select Contract Item** panel will open:

If the Select Contract Item panel does not open then “click” on the **Open**  button on the toolbar.

The bottom panel contains columns for:

- **Contract ID:** this is the identification number assigned to the contract.
- **Vendor ID:** this is the INDOT assigned number identifying the Prime Contractor.
- **Fed State Proj Nbr:** this is the assigned Federal or State Project Number.
- **Status:** this field indicates the current status of the contract, i.e. Pending, Active, Complete, Archived.
- **County:** this field contains a letter and number code identifying the county where the majority of the work is located.
- **Lvl 2:** this column indicates the District office administering the contract.
- **Lvl 3:** this column is not utilized by INDOT.
- **Lvl 4:** this column is not utilized by INDOT.
- **Location Description 1:** this column is the description of the physical limits of the contract.

Use the Scroll or Find, Filter, Sort technique to locate the appropriate contract.

“Double-click” on the appropriate **Contract ID**.

**Select Contract Item**

**Selection**

Contract: R-90003

Project:

Contract Item:

Find:

**Project**

PCN	Fed State/Prov Prj Nbr	Description
9620710	3387005	INTERSECTION IMPROVEMENT
982071A	3387005	TRAFFIC SIGNAL MODERNIZATION

OK Cancel

“Double-click” on the appropriate **PCN**.

**Select Contract Item**

**Selection**

Contract: R-90003

Project: 9620710

Contract Item:

Find:

**Contract Item**

Project Nbr	Category Nbr	Project Line Nbr	Item Code	Description	Supplemental Description 1
9620710	0001	0009	205-06933	TEMPORARY DITCH INLET PROTECTION	
9620710	0001	0010	205-06937	TEMPORARY SILT FENCE	
9620710	0001	0011	207-08263	SUBGRADE TREATMENT, TYPE IA	
9620710	0001	0012	301-07448	COMPACTED AGGREGATE, NO. 53, BASE	
9620710	0001	0013	306-08034	MILLING, ASPHALT, 38 mm	

OK Cancel

Use the Scroll or Find technique to locate the appropriate Line Number \ Description combination.

**Project Nbr:** Project Number is the PCN number for the item displayed.

**Category:** Category Item is not utilized by INDOT. The default setting is 0001.

**Line Item Nbr:** Line Item Nbr is the Contract Line Item Number as it appears in the contract or bid proposal

**Item Code:** Item Code refers to the INDOT defined contract work item code.

**Units Type:** Unit Type Indicates which measurement system is used (E= English, M= Metric or SI).

“Double-click” on the on the appropriate **Contract Item**.

The **Items** window opens. Details associated to the item may be viewed.

**Category:** **Category Item** is not utilized by INDOT. The default setting is 0001.

**Line Item Nbr:** **Line Item Nbr** is the Contract **Line Item Number** as it appears in the contract or bid proposal

**Item Code:** **Item Code** refers to the INDOT defined contract work item code.

**Units Type:** **Unit Type** Indicates which measurement system is used (E= English, M= Metric or SI).

**Spec Year:** **Spec Year** refers to the specification book year in which the item and material is referenced to.

**Description:** The description of the item.

**Major Item:** **Major Item** All contract items having an original contract value in excess of 5% of the original contract amount shall be considered as major items.

**Specialty:** **Non Participating funds:**

**Status Type:** **Status Type** is an indicator box identifying if the line item is Active, Pending, or Final.

**Unit Price:** **Unit Price** is the contracted price per unit for the Line Item from the contract.

**Bid Quantity:** **Bid Quantity** is the proposed or bid quantity of work for the line item in the contract.

The screenshot shows the AASHTO SiteManager software interface. The main window is titled 'Items'. It contains several input fields and checkboxes for data entry. At the top, there are fields for 'Contract ID' (R-90003) and 'Project Nbr' (9620710). Below these, there are fields for 'Project Line' (R012), 'Item Code' (301-07448), 'Units Type' (Megagram (SI) (Metric Ton)), and 'Spec Year' (1995). The 'Description' field contains the text 'COMPACTED AGGREGATE, NO. 53, BASE'. There are also fields for 'Major Item' (checkbox), 'Unit Price' (\$30.00000), 'Bid Qty' (156.000), and 'Bid Amt' (\$4,680.00). Below these, there are fields for 'Contract Line Nbr' (0012), 'Pay Plan Qty' (checkbox), 'Suppl Desc Req'd' (checkbox), and 'Material Discrepancy Adj' (checkbox). A 'Supplemental Descriptions' text area is located below these fields. At the bottom, there are fields for 'CO Nbr' (checkbox), 'Pend CO Qty' (0), 'Pend CO Amt' (0), and 'Net CO Qty' (0). The INDOT logo is visible at the bottom left of the form.

**Bid Amount:** Bid Amount is the bid quantity multiplied by the Unit Price of work for the line item in the contract.

**Proposal Line Nbr:** Proposal Line Nbr is the bid proposal line number for the work item.

**Related Item:** Related Item allows grouping of line Items for reporting and funding purposes. To report Items together, the user may create a related Item code such as RPT1 = Report #1 and then develop a report which selects and groups these Items together. Similarly, to fund a group of Items the same but not within the same Category, the user may create a related Item code such as FND1 = Funding Source #1 and select those Items with this code. This field will not be utilized by INDOT.

**Critical:** Critical checkbox will not be utilized by INDOT.

**Pay Plan Qty:** Plan Quantity indicates if the line Item is paid to plan quantity.

**Suppl Desc Req'd:** Supplemental Description Required check box indicates when a supplemental description is required for an Item Code.

**Material Discrepancy Adj:** Material Discrepancy Adjustment If the material discrepancy adjustment flag is checked on then the system will calculate material discrepancy line item adjustments for the item.

**Supplemental Descriptions:** Supplemental Description is an additional description of the Line Item.

**CO Nbr:** CO Nbr indicates the change order number that has added the item, if, this item was not an original contract item.

**Pend CO Qty:** The net change to the item quantity from all unapproved change orders. This field is display only.

**Pend CO Amt: Pending Change Order Amount** is **Pending CO Quantity** multiplied by the **Unit Price** of work for the line item in the contract. The net change to the item quantity from all unapproved change orders, multiplied by unit price. The item dollar amount that is associated to Change Orders in the Pending status.

**Net CO Qty: Net Change Order Quantity** is the item quantity that is associated to Change Orders in both Pending and Approved statuses. The sum of both Approved and Pending Change Order quantities.

To select a new item “click” the **Open**  button located on the toolbar.



**Select Contract Item**

**Selection**

Contract: R-90003  
 Project: 9620710  
 Contract Item: 0012

Find:

**Contract Item**

Project Nbr	Category Nbr	Project Line Nbr	Item Code	Description	Supplemental Description 1
9620710	0001	0012	301-07448	COMPACTED AGGREGATE, NO. 53, BASE	
9620710	0001	0013	306-08034	MILLING, ASPHALT, 38 mm	
9620710	0001	0014	306-08043	MILLING, TRANSITION	
9620710	0001	0015	401-07334	QC/QA-HMA, 3, 76, SURFACE, 9.5 mm	
9620710	0001	0016	401-07403	QC/QA-HMA, 3, 76, INTERMEDIATE, 19.0 mm	

OK Cancel

Use the Scroll or Find technique to locate the appropriate **Line Number \ Description** combination.  
 “Double-click” on the on the appropriate Contract Item.

**AASHTO SiteManager**

File Services Window Help

**Items** Close

Contract ID: R-90003 Project Nbr: 9620710

Project Nbr: 9620710 Project Line: 0015

Item Code: 401-07334 Units Type: Megagram (SI) (Metric Ton) Spec Year: 1995

Description: QC/QA-HMA, 3, 76, SURFACE, 9.5 mm

Major Item: ☐ Unit Price: \$53,800.00 Bid Qty: 784.000 Bid Amt: \$46,883.20

Contract Line Nbr: 0015 Pay Plan Qty: ☐ Suppl Desc Req'd: ☐ Material Discrepancy Adj: ☐

Supplemental Descriptions:

CO Nbr:  Pend CO Qty: 0 Pend CO Amt: 0 Net CO Qty: 0

INDOT

To exit “click” the **Close**  button on the toolbar.

## Viewing a Contract Item

### Exercise A-2-2-4-T

#### Group Exercise

This exercise will demonstrate how to open and view the information contained in the Contract **Item** panel.

Log into SiteManager as: inquire  
Enter Password: pass

Navigate from **Main Panel**:

“Double-Click” on the **Contract Administration (+)** icon

“Double-Click” on the **Contract Records (+)** icon

“Double-Click” on the **Items** icon

“Click” the **Open** button on the toolbar

Select “double-click” on the appropriate **Contract ID:** R-90004

Select “double-click” on the appropriate Project (**PCN**): 9620710

Select “double-click” on the appropriate **Line Item Nbr:** 0021

View information for “**Guardrail, W Beam, 1.905 m spacing**”

“Click” the **Close** button on the toolbar to exit.